SMART

Statewide Management, Accounting and Reporting Tool

Activity Guide –

PC360: Managing Projects

State of Kansas

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Activity 1 - Exercise: Creating Projects

Scenario
A new legal tracking system has been approved for your agency to use. As an **Agency Projects Manager,** you need to create a project called “Legal Tracking System” to define the structure of the project before activities and transactions are added. After you create the project, add Anthony Smart as the Project Manager.

Menu Path
Project Costing → Project Definitions → General Information

UPK Procedure
Creating Projects

Job Aid
Not Applicable

Instructions
Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require a “user specific field,” be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
General Information: Add a New Value	
Business Unit	17300
Project	See user specific data
General Information	
Description	Legal Tracking System
Integration	17300
Project Type	REIMB
Start Date	<Today’s Date>
End Date	<1 year after Today’s Date>
* Click the **Save** button	
Location	
Location Code	KSALI
Phases	
Phase Type	CREATE
***** Click the **Save** button	
* Click the **Team** link from the left menu pagelet	

Field	Value
Team: Team Detail	
Employee ID	00021594285
Project Role	PROJ MANAGER
***** Select the **Project Manager** checkbox	
* Click the **Save** button	

User Specific Data

User	Field	Value
User 1	Project	LegalTracking01
User 2	Project	LegalTracking02
User 3	Project	LegalTracking03
User 4	Project	LegalTracking04
User 5	Project	LegalTracking05
User 6	Project	LegalTracking06
User 7	Project	LegalTracking07
User 8	Project	LegalTracking08
User 9	Project	LegalTracking09
User 10	Project	LegalTracking10
User 11	Project	LegalTracking11
User 12	Project	LegalTracking12
User 13	Project	LegalTracking13
User 14	Project	LegalTracking14
User 15	Project	LegalTracking15
User 16	Project	LegalTracking16
User 17	Project	LegalTracking17
User 18	Project	LegalTracking18
User 19	Project	LegalTracking19
User 20	Project	LegalTracking20
User 21	Project	LegalTracking21
User 22	Project	LegalTracking22
User 23	Project	LegalTracking23
User 24	Project	LegalTracking24
User 25	Project	LegalTracking25
Instructor 1	Project	LegalTracking26
Instructor 2	Project	LegalTracking27
Instructor 3	Project	LegalTracking28

Activity 2 - Walkthrough: Creating Project Activities

Scenario
A project has been created to install a new legal tracking system for your agency. An activity called “Install” must be created for the “Legal Tracking System” project to track compliance of the entities your agency regulates before project transactions can be booked. Also, create a second activity called “Install 2”.

Menu Path
Project Costing → Project Definitions → General Information

UPK Procedure
Creating Projects

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to create a project activity in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require a “user specific field,” be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, ask the instructor for guidance.

Required Data

Field	Value
General Information: Find an Existing	
Business Unit	17300
Description	See user specific data
General Information	
* Select the **Project Activities** link	
Project Activities	
Activity Name	Legal Tracking System
Activity	Legal_Track
Start Date	<Today’s Date>
End Date	<Today’s Date + 1 year>
* Click the checkbox next to **Legal Tracking System** activity	
* Click the **Add** button	
Activity Name	Install
Activity	Install
Start Date	<Today’s Date>
End Date	<Today’s Date + 6 mo.>

Field	Value
* Click the **Save** button	
***** Select the checkbox next to the **Install** activity	
* Select the **Activity Definition** button	
General Information	
Description	Install (defaults)
Location	
Location Code	KSALI
***** Click the **Activity Status** link	
Status	O
***** Click the **Save** button	
* Select the **General Information** link	
* Select the **Return to Project Activities** link	
Project Activities: Schedule	
* Select the checkbox next to the **Install** activity just created	
* Click the **Add** button	
Activity Name	Install 2
Activity	Install_2
Start Date	<End date from activity above>
End Date	<1 year after Today's Date>
* Select the **Activity Definition** button next to **Install 2** activity	
General Information	
Description	Install 2 (defaults)
Location	
Location Code	KSALI
***** Click the **Add a row** button	
Location Code	KWICH
Sequence	2
***** Click the **Activity Status** link	
Status	O
***** Click the **Save** button	
* Select the **Return to General Information** link	
***** Click the **Return to Project Activities** link	
* Click the checkbox next to **Install**	
* Click the **Indent** button	
* Click the checkbox next to **Install 2**	
* Click the **Indent** button	
* Click the **Save** button	

User Specific Data

User	Field	Value
User 1	Description	001 - Legal Tracking System
User 2	Description	002 - Legal Tracking System
User 3	Description	003 - Legal Tracking System
User 4	Description	004 - Legal Tracking System
User 5	Description	005 - Legal Tracking System
User 6	Description	006 - Legal Tracking System
User 7	Description	007 - Legal Tracking System
User 8	Description	008 - Legal Tracking System
User 9	Description	009 - Legal Tracking System
User 10	Description	010 - Legal Tracking System
User 11	Description	011 - Legal Tracking System
User 12	Description	012 - Legal Tracking System
User 13	Description	013 - Legal Tracking System
User 14	Description	014 - Legal Tracking System
User 15	Description	015 - Legal Tracking System
User 16	Description	016 - Legal Tracking System
User 17	Description	017 - Legal Tracking System
User 18	Description	018 - Legal Tracking System
User 19	Description	019 - Legal Tracking System
User 20	Description	020 - Legal Tracking System
User 21	Description	021 - Legal Tracking System
User 22	Description	022 - Legal Tracking System
User 23	Description	023 - Legal Tracking System
User 24	Description	024 - Legal Tracking System
User 25	Description	025 - Legal Tracking System
Instructor 1	Description	026 - Legal Tracking System
Instructor 2	Description	027 - Legal Tracking System
Instructor 3	Description	028 - Legal Tracking System

Activity 3 - Demonstration: Closing Projects

Scenario
The “Accounting System” project has been implemented and it was a success. The project “Accounting System" now needs to be closed. In this scenario, close the “Accounting System” project.

Menu Path
Project Costing → Project Definitions→ General Information

UPK Procedure
Not Applicable

Job Aid
Not Applicable

Instructions
Watch your instructor as he/she demonstrates how to close projects in SMART. Do NOT perform this exercise along with your instructor.

Required Data

Field	Value
General Information: Find an Existing Value	
Business Unit	17300
Description	See user specific data
General Information	
* Note the **Project End Date**	
* Select the **Project Status** link “Open”	
Status	
* Click the **Add a new row** button	
Effective Date	< Project End Date – 5 days >
Status	C
* Click the **Save** button	

User	Field	Value
Instructor 1	Description	Accounting System - 001
Instructor 2	Description	Accounting System - 002
Instructor 3	Description	Accounting System - 003

Activity 4 - Challenge: Entering and Maintaining Projects

Scenario

Improvements to Highway K-61 have been approved by the State of Kansas. As the **Agency Projects Manager,** you must now enter the project, with the name "K-61 Enhancement", and include the project activities for plan, design, and contract. Once the project is created, you should then close the project.

Menu Path

Project Costing → Project Definitions → General Information

UPK Procedure

Creating Projects

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require a "user specific field," be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
General Information: Add a New Value	
Business Unit	17300
Project	See user specific data
General Information	
Description	K-61 Enhancement
Integration	17300
Project Type	REIMB
Start Date	<Today's Date>
End Date	<2 years after Today's Date>
* Click the **Save** button	
Location	
Location Code	KSALI
Phases	
Phase Type	CREATE
Description	Plan & Design Activities
From Date	< Today's Date >

Field	Value
Through Date	< 1 year after Today's Date >
* Click the **Add a new row** button	
Phase Type	IMPLEM
Description	Contract Activity
From Date	< 1 year after Today's Date >
Through Date	< 2 years after Today's Date >
* Click the **Save** button	
Activities	
* Select the **Project Activities** link	
Project Activities	
Activity Name	Plan
Activity	Plan
Start Date	<Today's Date>
End Date	<6 mo. after Today's Date>
* Click the **Save** button	
* Select the **Activity Definition** button	
General Information	
Description	Plan
Location	
Location Code	KSALI
* Click the **Activity Status** link	
Status	O
* Click the **Save** button	
* Select the **Return to General Information** link	
* Select the **Return to Project Activities** link	
* Select the checkbox next to the **Plan** activity just created	
* Click the **Add** button	
Activity Name	Design
Activity	Design
Start Date	< 1 day after End Date above>
End Date	<1 year after Today's Date>
* Click the **Save** button	
* Select the **Activity Definition** button	
General Information	
Description	Design
Location	
Location Code	KSALI
* Select the **Activity Status** link	

Field	Value
Status	O
* Click the **Save** button	
* Select the **Return to General Information** link	
* Select the **Return to Project Activities** link	
* Select the checkbox next to the **Design** activity just created	
* Click the **Add** button	
Activity Name	Contract
Activity	Contract
Start Date	<1 year after Today's Date>
End Date	< 2 years after Today's Date>
* Click the **Save** button	
* Click the **Activity Definition** button	
General Information	
Description	Contract
Location	
Location Code	KSALI
***** Select the **Activity Status** link	
Status	O
* Click the **Save** button	
* Select the **Return to General Information** link	
* Select the **Return to Project Activities** link	
* Select the **Return to General Information** link	
General Information	
***** Select the **Project Status** link "Open"	
Status	
***** Click the **Add a new row** button	
Effective Date	< Project End Date – 10 days>
Status	C
***** Click the **Save** button	

User Specific Data

User	Field	Value
User 1	Project	K-61Enhance-001
User 2	Project	K-61Enhance-002
User 3	Project	K-61Enhance-003
User 4	Project	K-61Enhance-004
User 5	Project	K-61Enhance-005
User 6	Project	K-61Enhance-006
User 7	Project	K-61Enhance-007
User 8	Project	K-61Enhance-008

User	Field	Value
User 9	Project	K-61Enhance-009
User 10	Project	K-61Enhance-010
User 11	Project	K-61Enhance-011
User 12	Project	K-61Enhance-012
User 13	Project	K-61Enhance-013
User 14	Project	K-61Enhance-014
User 15	Project	K-61Enhance-015
User 16	Project	K-61Enhance-016
User 17	Project	K-61Enhance-017
User 18	Project	K-61Enhance-018
User 19	Project	K-61Enhance-019
User 20	Project	K-61Enhance-020
User 21	Project	K-61Enhance-021
User 22	Project	K-61Enhance-022
User 23	Project	K-61Enhance-023
User 24	Project	K-61Enhance-024
User 25	Project	K-61Enhance-025
Instructor 1	Project	K-61Enhance-026
Instructor 2	Project	K-61Enhance-027
Instructor 3	Project	K-61Enhance-028

Activity 5 - Demonstration: Viewing the Project Transaction Summary and Project Costs

Scenario

As the **Agency Projects Manager** of the “Legal Tracking System” project, you need to keep track of all the transactions associated with this project. View the Project Transaction Summary page to view transactions for your project including all project costs for the first accounting period for different analysis types and their corresponding transactions.

Menu Path

Project Costing → Transaction Definitions → Transaction List

UPK Procedure

Not Applicable

Job Aid

Analysis Types
Project Transactions

Instructions

Watch your instructor as he/she demonstrates how to close projects in SMART. Do NOT perform this exercise along with your instructor.

Required Data

Field	Value
Summarize by Category: Find an Existing Value	
Business Unit	17300
Project	000000000000001
Activity	000000000000002
Transaction List	
Analysis Group	ALL
From Date	01/01/2010
Through Date	02/01/2010